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Netherlands

EXPORTER GUIDE ANNUAL

BENELUX COUNTRIES

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Report Highlights:
This report provides an overview for US companies interested in exporting to the Benelux countries (Netherlands, Belgium and Luxembourg). Figures of the first 4 months of 2009 show that the current economic situation has strengthened the importance of the Benelux as a consumer, food processing and trading market for US products.

Post:
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Section 1. Market Overview

Marcoeconomic Situation and Trends

The Netherlands:

Because of the country's strategic location on the North Sea and the Rhine, trade and distribution are in the Dutch genes. The Port of Rotterdam is among the most important sea ports in the world. Amsterdam Schiphol Airport occupies a similar position in Europe. Their geographic location and function as international hubs in Europe are seen as a major advantage. The ports of Rotterdam and Amsterdam have outstanding infrastructure and logistics services. The Dutch are business people. The population is highly educated, internationally oriented and largely multilingual. This explains why the Netherlands has proved attractive for foreign companies.

In June 2009, the Netherlands Bureau for Economic Policy Analysis (CPB) forecast that Dutch GDP will shrink by almost 5 percent in comparison to 2 percent growth in 2008. In 2010 the economy will not recover as the GDP will drop further by 0.50 percent. The export of goods, an essential element of the Dutch economy, is expected to show a dramatic drop of -16.25 percent this year and a small recovery of 0.5 percent in 2010. Unemployment will increase from 4 percent in 2008 to 5.5 percent in 2009 and 9.5 percent in 2010. At the same time inflation will remain low at 1 percent in both 2009 and 2010.

Figure 1: Key Data Dutch Economy

	2006	2007	2008	2009*	2010**
Economic Growth %	3.25	3.5	2.1	-4.75	-0.50
Inflation (HIPC) %	1.7	1.6	2.5	1.0	1.25
Unemployment %	5.5	4.5	3.9	5.5	9.50
GDP (billion)	€535	€567	€595	€571	€574

Source: Central Bureau of Statistics/Netherlands Bureau for Economic Policy Analysis

* FAS/The Hague estimate

** FAS/The Hague forecast

Belgium:

Belgium suffered a significant recession in 2008–2009, and economic activity will likely remain weak into 2010. After slowing in recent quarters, growth turned negative in the fourth quarter of 2008, and the contraction is forecast to continue throughout 2009, with a weak recovery beginning only in 2010. Economic stimulus packages in many countries and looser monetary policy will help cushion the global downturn, but Belgian growth is still expected to fall to around -3 percent in 2009, as the recovery in the world economy will be slowed by the aftermath of the financial crisis. Risks to the forecast are large and tilted to the downside, mainly reflecting the high uncertainties surrounding the international environment. Unemployment will rise, eventually peaking well above 8 percent during the downturn. Inflation is estimated to fall to around 1 percent in 2009.

Figure 2: Key Data Belgian Economy

	2006	2007	2008	2009*
Economic Growth %	3.0	2.6	1.0	-3.1
Inflation (CPI) %	2.3	1.8	4.5	1.0
Unemployment %	8.3	7.5	7.0	8.5
GDP (billion)	€319	€327	€330	€320

Source: www.nbb.be

* FAS/The Hague estimate

Benelux Importers Key in US Exports to the EU-27

Total US exports of agricultural, fish and forestry products grew in 2008 to USD 126 billion [1] . Roughly 10% of those exports were shipped to the EU-27. For the purpose of this report, the main focus is on the Consumer-Oriented agricultural and Fishery and seafood products. The EU market continues to be an important one as 10% of all US exported Consumer-Oriented products end up on this market. The importance of the EU for US seafood exports is even greater as 30% was sold on the EU market in 2008. For more information look at the following BICO reports, http://www.fas.usda.gov/scriptsw/bico/bico.asp?Entry=lout&doc=527, http://www.fas.usda.gov/scriptsw/bico/bico.asp?Entry=lout&doc=402, http://www.fas.usda.gov/scriptsw/bico/bico.asp?Entry=lout&doc=358 and below figure.

Figure 3: US Exports Of Agricultural, Fish and Forestry Products, by Destination (in million USD)

2008	**World**	**EU-27**	**Benelux**
Bulk products	51,743	3,346	687
Intermediate products	21,192	2,382	535
Consumer Oriented products	**42,503**	**4,366**	**1,093**
Forest products	6,606	1,096	99
Fish and Seafood products	**3,987**	**1,109**	**205**
Total	126,033	12,299	2,619

Source: www.fas.usda.gov (BICO reports)

The exports of US Consumer-Oriented products to the EU continue to grow and denote the highest export levels, USD 4.4 million in 2008. Although tree nuts still is the largest product group by far, exports of processed fruit & vegetables, wine & beer, red meats and fresh fruit are the drivers behind this trend. Fish fillets (mainly Alaska pollack) and salmon still boost the exports of fishery products.

Figure 4: US Exports Of Consumer-Oriented Agricultural And Fish & Seafood Products to the EU-27 (in 1,000 USD)

US exports to the EU-27	CY **2005**	CY **2006**	CY **2007**	CY **2008**	Jan-Apr **2008**	Jan-Apr **2009**
Consumer-Oriented Agricultural Total	3,505,047	3,606,857	3,837,377	4,366,199	1,379,783	1,194,020
Snack Foods (Excl Nuts)	85,174	83,686	103,086	117,606	35,864	34661
Breakfast Cereals & Pancake Mix	10,791	9,113	11,903	15,692	4,086	6,090
Red Meats, Fresh/Chilled/Frozen	151,040	117,786	121,969	251,927	67,755	40,844
Red Meats, Prepared/Preserved	4,746	5,772	3,429	5,702	1,892	988
Poultry Meat	173,916	121,520	131,143	130,892	24,106	57,705
Dairy Products	44,890	84,946	152,350	144,883	60,738	23,995

Eggs & Products	43,200	44,668	73,374	70,054	21,719	23,598
Fresh Fruit	154,649	151,007	179,791	199,405	71,418	58,457
Fresh Vegetables	40,663	35,134	39,248	45,871	21,477	18,100
Processed Fruit & Vegetables	262,398	320,283	371,757	529,875	157,276	139,330
Fruit & Vegetable Juices	121,012	165,290	142,379	164,616	61,821	61,828
Tree Nuts	1,546,698	1,445,846	1,428,281	1,475,145	447,704	375,744
Wine & Beer	329,244	476,025	468,118	493,284	158,797	113,643
Nursery Products & Cut Flowers	83,584	83,872	109,597	102,172	50,044	41,378
Pet Foods (Dog & Cat Food)	86,548	84,297	99,358	91,493	31,079	20,377
Other Consumer-Oriented Products	366,494	377,611	401,594	527,584	164,006	177,218
Fish & Seafood Products, Edible Total	927,694	1,043,411	1,067,416	1,108,528	374,455	259,986
Salmon, Whole Or Eviscerated	68,396	80,319	106,078	110,446	27,443	12,254
Salmon, Canned	84,372	81,859	88,856	90,597	31,740	18,233
Crab & Crabmeat	1,475	2,124	3,436	5,133	2,096	2,214
Surimi (Fish Paste)	69,961	42,583	32,098	47,163	13,984	9,407
Roe & Urchin (Fish Eggs)	19,732	19,614	34,230	54,112	14,635	4,412
Other Edible Fish & Seafood	683,758	816,912	802,718	801,077	284,557	213,466

Source: www.fas.usda.gov (BICO reports)

The Benelux proves to be an excellent consumer, food processing and trading market for US products as Benelux importers are responsible for a quarter of all Consumer-Oriented products and almost a fifth of all Fishery products imported into the EU. The first 2009 figures are showing that the current economic situation has only strengthened the importance of the Benelux.

The current economic situation is affecting US exports. During the first 4 months of this year, exports of Consumer-Oriented products to the EU dropped by 13.5% while exports of Seafood products dropped by almost a third. However, the drop in exports to the Benelux countries was much lower; US exports of Consumer-Oriented and Seafood products decreased by respectively 2 and 14%. As a result, the Benelux trade is gaining market share as almost a third of all Consumer-Oriented products and almost a quarter of Seafood products are currently being imported by Benelux traders.

Figure 5: US Exports Of Consumer-Oriented Agricultural And Fish & Seafood Products to the Benelux (in 1,000 USD)

US exports to Belgium/Netherlands/Luxembourg	CY **2005**	CY **2006**	CY **2007**	CY **2008**	Jan-Apr **2008**	Jan-Apr **2009**
Consumer-Oriented Agricultural Total	861,107	913,467	950,101	1,092,531	370,665	361,833
Snack Foods (Excl Nuts)	12,581	11,527	21,662	18,201	5,144	6,903
Breakfast Cereals & Pancake Mix	1,553	1,419	2,570	3,832	1,028	1,337
Red Meats, Fresh/Chilled/Frozen	34,084	33,442	42,583	78,013	17,973	20,329
Red Meats, Prepared/Preserved	1,289	1,456	716	1,272	414	395
Poultry Meat	651	581	1,328	4,210	974	857
Dairy Products	10,374	28,752	72,351	57,105	27,268	8,189
Eggs & Products	3,876	7,663	14,133	7,937	2,483	1,812
Fresh Fruit	42,745	27,733	33,698	45,721	21,313	14,182
Fresh Vegetables	8,781	8,154	8,492	11,208	6,129	4,580
Processed Fruit & Vegetables	57,511	71,353	75,691	104,520	28,591	28,380
Fruit & Vegetable Juices	94,362	125,055	114,829	136,393	48,930	54,987
Tree Nuts	335,412	337,678	307,213	324,847	101,688	111,702
Wine & Beer	46,272	47,479	27,798	33,934	11,910	8,082
Nursery Products & Cut Flowers	64,175	67,024	85,476	79,308	41,281	30,079
Pet Foods (Dog & Cat Food)	26,812	33,240	25,614	21,863	7,481	7,579
Other Consumer-Oriented Products	120,630	110,909	115,945	164,167	48,057	62,441

Fish & Seafood Products, Edible Total	183,161	206,531	184,166	204,510	69,480	59,761
Salmon, Whole Or Eviscerated	11,158	10,916	11,199	12,849	1,048	807
Salmon, Canned	9,124	9,924	10,397	14,987	6,956	4,198
Crab & Crabmeat	341	1,469	920	2,124	1,176	1,729
Surimi (Fish Paste)	14,995	10,735	2,964	6,506	932	4,069
Roe & Urchin (Fish Eggs)	4,752	3,300	5,675	22,912	4,940	281
Other Edible Fish & Seafood	142,790	170,187	153,011	145,133	54,426	48,677

Source: www.fas.usda.gov (BICO reports)

Key Developments and the Impact on Consumer Buying Habits

The Benelux has over 27.8 million inhabitants and is the most densely populated region in the EU, with 412 people per square kilometer. More than two-thirds of its slowly growing population lives in a 100 mile corridor stretching from Amsterdam to Brussels.

During the past decades more and more women have entered the labor force. This has resulted in double-income households, where time has become scarce. In their spare time they want to focus on their family/friends, health/well-being and travel. It seems that daily cooking is not on that priority list unless it's part of spending time with family/friends.

The double income households are still willing to pay additional money for convenience, variety, taste, and health in food. As a result they are purchasing more meal components and ready-to-cook products, but also this group is experimenting more with ethnic cuisines.

Another development that drives changing consumer buying habits is the on-going trend towards smaller households. There are some 12 million households with an average size of 2.3 people. Single and two person households are growing and households of 4 or more persons declining. Not only does this trend demand smaller portions, industry contacts also claim that consumers tend to buy more expensive, value-added products or meal components when cooking for only one or two persons.

The Benelux population is graying as the 0-20 and 65+ age group is respectively declining and growing rapidly. It is worth noting that the 65+ age group has a relatively high purchasing power since, in general, they live in paid-off houses and benefit from a good pension.

Figure 6: Key Demographic Figures For The Benelux

	2005	2006	2007	2008	2009*
Population, in millions	26.7	26.8	27.4	27.6	27.8
Number of Households, in millions	11.5	11.7	11.9	12	12.1
Household Size	2.3	2.3	2.3	2.3	2.3

Source: CBS, Statbel

* FAS/The Hague estimate

Figure 7: Dutch Population By Age Group, In Percentage

Year	0 – 19	20 – 39	40 – 64	65 – 79	80+	Total Population
1963	38.1	26.4	26.1	7.9	1.5	11,889,962

1973	35.0	29.0	25.6	8.6	1.8	13,387,623
1983	29.7	32.6	26.0	9.4	2.4	14,339,551
1993	24.6	32.9	29.5	10.0	3.0	15,239,182
2003	24.5	28.6	33.2	10.4	3.4	16,192,572
2009*	23.9	25.7	35.5	11.2	3.8	16,486,587

Source: CBS, * CBS estimate

Figure 8: Main Non-Dutch Population, By Ethnicity

	2005	2006	2007	2008	2009*
Indonesian	396,080	393,057	389,940	387,124	384,497
Turkish	358,846	364,333	368,600	372,852	378,330
Surinamese	329,430	331,890	333,504	335,679	338,678
Moroccan	315,821	323,239	329,493	335,208	341,528
Netherlands Antilles & Aruba	130,538	129,683	129,965	131,387	134,774

Source: CBS, * CBS estimate

Figure 9: Advantages And Challenges US Products Face In The Benelux

Advantages	**Challenges**
• Affluent and open-minded consumers • Highly developed infrastructure, trade history and mentality • Strong interest in buying new and innovative products and/or concepts • Favorable image of American products	• Saturated markets • High transportation and time costs • Competition from local companies • Tariffs and Non-Tariff trade barriers • Highly consolidated retail industry • Current economical condition

Source: FAS/The Hague

Figure 10: Consumer Trends

Consumers' needs and preferences:	
Health:	natural ingredients, lower calories, low or no sugar, healthy meals
Convenience:	fresh pre-packed food components, take-away, fresh ready-to-eat meals
Price:	discount, special offers, will only accept higher prices as long as they can be justified
Food Safety:	more information, more guarantees
Stores:	there is a need for the more traditional store that offers a wide assortment of products, fresh, specialty and luxury products, personalized service, etc. while on the other hand there is a need for discounters, stores that focus on price.

Source: FAS/The Hague

Changing Tastes

The non-Dutch population in the Netherlands (20%) has grown by 5 percent during the past 2 years, whereas the population with Dutch ethnicity grew during the same period by only 1 percent. As a result there has been strong growth in the number of stores serving ethnic niche markets and in demand for non-traditional Dutch food. The non-Belgian population in Belgium is much smaller and accounts for only 7%. More information on this subject can be found on http://www.fas.usda.gov/scriptsw/attacherep/default.asp GAIN NL 7021.

Organic Food

Recent figures show that although consumers are increasingly buying organic products (mainly bread and dairy products), the organic industry still remains a niche industry and has only 1.8 percent market share in the Benelux. More information on the Benelux market for organic products can be found on http://www.fas.usda.gov/scriptsw/attacherep/default.asp GAIN NL 6024.

Awareness of Health and Well-Being

Consumers are becoming more aware of and concerned about the effects food has on their health and well-being. One driver is that there has been a trend to a more healthful lifestyle in Western countries. The following US industries have all benefitted from this trend: nuts (pistachios, almonds, walnuts, etc.), fruits (cranberries, pomegranates, berries, etc.), seafood (salmon, halibut, etc.). Another driver is that consumers are more cautious about their diet due to foodborne illnesses. Consumers are looking for and finding more information on this topic; the media, including the Internet, TV and magazines, respond to this desire and feed into it. Food processors and retailers play a crucial role, as well, as they develop and market food products to create, anticipate and meet consumers' needs.

Section 2. Exporter Business Tips

Local Business Customs

Following are some characteristics of doing business in the Netherlands, Belgium or Luxembourg:

- Most business people speak English and have a high level of education (Masters or Bachelors degree).

- Generally speaking, they are straightforward and business-minded. They want to be well informed about the product/service and their business partner before doing business. At the same time, they do not want to waste their time and can be quick decision makers.

- Due to the increasing power of retailers and to changing consumers' demands, food processors are increasingly looking for long-term partnerships rather than a one-off business transaction.

- In times of a weaker dollar, importers are especially looking for added value from the US. They are looking for healthy or unique products for their retail/foodservice customers.

Food Standards & Regulations and General Import & Inspection Procedures

A detailed report on import regulation standards and also on general import and inspection procedures can be found on the FAS homepage: GAIN Report Number: NL8017 and BE8006. http://www.fas.usda.gov/scriptsw/attacherep/default.asp

Section 3. Market Sector Structure And Trends

The Food Retail Market

In 2008, the turnover of the food retail industry was an estimated USD 71 billion (1 USD=0.684 €). The consolidated full-service supermarket sector makes around 90% of total food retail sales. The remaining 10% includes food sales made at department stores, delicatessen stores and traditionally non-food stores.

Supermarkets:

The distribution in the Benelux supermarket industry is consolidated. Belgium and the Netherlands have respectively 3 and 2 large distributions chains.

Figure 11: Supermarket Chains In Belgium, 2008 market shares

Pruchase Group	Market Share, %	Supermarket Format	Market Share, %
Carrefour	28.5	-Carrefour	26.0
		-Mestdagh	2.5
Colruyt	23.0	-Colruyt	18.0
		-Spar	3.0
		-Alvo	2.0
Delhaize	23.0	-delhaize	23.0
Aldi	12.5	-Aldi	12.5
Lidl	4.5	-Lidl	4.5
Louis Delhaize	3.5	-Louis Delhaize	-
		-Match Bel	-
		-Profi	-
Intermarche	2.0	-Intermarche	2.0
Other	3.0	-Other	3.0

Source: Store Check, FAS/TheHague calculations

Figure 12: Supermarket Chains In The Netherlands, 2008 market shares

Purchase Group	Market Share, %	Supermarket Format	Market Share, %
Albert Heijn	31.3	-Albert Heijn	30.0
		-AH XL	1.3
Superunie	30.7	-Plus	6.1
		-Jumbo	4.8
		-Sligro	2.7
		-Coop	2.5
		-Spar	2.2
		-Other	12.4
Schuitema	13.2	-C1000	13.2
Aldi	8.5	-Aldi	8.5
Super de Boer	6.8	-Super de Boer	6.8
Lidl	4.8	-Lidl	4.8
Other	4.7	-Other	4.7

Source: AC Nielsen/ FAS/TheHague calculations

Besides the traditional supermarket chains as discussed above, we see firms entering the food retail market. Not only are traditionally non-food retailers like Ikea, HEMA and V&D succesfully selling food products, also up-scale department stores and delicatessen stores are selling specialty food products and drinks.

Department Stores:
Department stores, generally part of a larger chain, offer only profitable specialty foods. More and more the traditionally non-food upscale department stores are selling food products, although still on a small scale. They have become an excellent outlet for selling specialty foods. They mainly focus on innovative and seasonal or event-related specialty products. Some smaller independent non-food stores are following this trend as well. Other non-food retail chains (like De Tuinen and Xenos) have moved into food retailing as well, by focusing on healthy foods, or for instance Asian and Mediterranean cuisines.

Figure 13: Leading Department Stores In The Benelux

Company Name	Website
Bijenkorf	www.bijenkorf.nl
Hema	www.hema.nl
Inno	www.inno.be
V&D	www.vd.nl

Source: FAS/The Hague

Figure 14: Leading Non-Food Retail Chains In The Benelux Selling Specialty Foods

Company Name	Website
De Tuinen	www.detuinen.nl
Oil & Vinegar	www.oilvinegar.com
Xenos	www.xenos.nl

Source: FAS/The Hague

More information on this segment can be found in the following report, http://www.fas.usda.gov/scriptsw/attacherep/default.asp GAIN NL 7021.

Delicatessen Stores:
Traditional butcher and fruit & vegetable shops, as well as small independent family-run supermarkets, are losing market share. The supermarkets are either taken over by big retail chains or in most cases are closing down. The traditional butcher and fruit & vegetable shops are increasingly transforming into delicatessen shops (selling luxury meal components, snacks, etc) or moving into catering. By adding more value to their once basic products, they manage to stay in business and serve products that the regular retailer does not sell.

The current economic situation is having an impact on Benelux consumers' spending. As their confidence in the economy has gone down and they are worried about their savings, jobs and pensions, consumers are noticeably spending less money on eating out. Restaurant owners were first hit by the smoking-ban in July 2008. A year later industry experts are saying that spending in restaurants has dropped considerably. Especially, the more expensive restaurants have been hit hard. Consumers are choosing more often to stay home and prepare themselves a luxurious meal, which is beneficial to the food retailers. On the other hand retailers see that their customers are more price sensitive than before, less loyal and increasingly shopping at discounters like the German based Aldi and Lidl but also Colruyt, Dirk van de Broek, Digros, etc.

The Foodservice Market

The turnover of the Benelux HRI foodservice industry in 2008 was over an estimated USD 30 billion (1USD=0.684 €). Restaurants dominate the Benelux foodservice industry and make up roughly 50% of the industry. Restaurant owners are generally independent entrepreneurs, working with both local suppliers and wholesalers. An overview of leading Dutch wholesalers and distributors are detailed in Appendix 1. The second largest foodservice segment covers all cafés and bars, where the focus is mainly on serving drinks and to a much lesser extent finger foods and basic meals. Finally, a handful of international and national players dominate the much smaller fast food (20%) and catering industry (10%) and their products are delivered through proprietary large distributors. For more information on the HRI foodservice market please visit www.fas.usda.gov GAIN NL9002.

Unfortunately, the same obstacles that limit sales to the retail sector hamper potential U.S. sales to the foodservice industry. Basic products such as regular beef and poultry are essentially barred from the market due to sanitary restrictions, while high tariffs and the restrictions on many biotech products keep many US processed foods off store shelves.

The Food Processing Market

The food processing industry is an important sector in the Benelux economy as it represents about 10% of total GDP. The industry has an estimated turnover of USD 116 billion for 2008 [2] . Within the food processing industry, the production of meat and dairy products forms the largest segment, followed by cigarettes, bakery, confectionary, flour and sugar industries.

Figure 16: An Overview Of The Benelux Food Processing Market, 2008 figures

Turnover food processing industry	USD 116 billion
Number of processing companies	5,400
US exports to the Benelux:	
- Bulk Agricultural Products	USD 687 million
- Intermediate Agricultural Products	USD 535 million
- Consumer-Oriented Agricultural Products	USD 1,093 million
- Fish and Seafood Products	USD 205 million

Source: FAS/The Hague

The majority of the processing companies are located close to the main port cities of Rotterdam, Antwerp and Amsterdam. Knowledgeable traders, an excellent distribution system and an innovative economy make the Benelux an attractive market for processing and trading agricultural products.

Although the Benelux itself has a population of only 27.8 million people, the food processing industry has access to roughly 75 million affluent consumers within 200 miles of the Benelux border, or 15% of the total EU population. This densely populated region covers important markets like North Rhine Westphalia, London and Paris. Germany, France and the UK continue to be important markets for the processing industry; however, greater growth opportunities are to be found in Southern, Central and Eastern Europe. Processors therefore benefit from the expansion of the EU. Opportunities are also to be found outside the EU, in growing markets in South America and Asia.

Section 4. Best High-value Products Prospects

Figure 17: The Best High-Value Products Prospects

Commodity	Benelux Imports 2008, (USD 1,000)	Benelux Imports from US 2008, (USD 1,000)	Key Constraints Over Market Development	Market Attractiveness for USA
Scallops / 030721	15,987	9,975	price - lack of knowledge by customer	growing demand in the high end HRI industry
Salmon prepared or preserved / 160411	37,672	10,843	some competition from Canada	great image and growing demand
Milk and cream in solid form / 040210	417,418	13,376	competition from Germany, France and Poland	the Benelux has a big export-focused food processing industry
Food preparations / 210690	929,475	131,109	competition from Germany and Switzerland	the Benelux has a big export-focused food processing industry
Almonds / 080212	146,208	92,043	US represents 63% of total imports, some competition comes from Spain	growing demand from the food ingredients market
Pistachios / 080250	180,898	132,820	competition from Iran	growing demand from the snack food and confectionary industry
Fruit and other edible parts of plants / 200899	225,880	13,24,742	competition from Costa Rica, India and Ecuador	

Foliage / 060491	323,583	90,029	Depending on the developments in the cutflower industry, competition from Costa Rica, Guatemala, Israel, Mexico, etc.	Benelux dominates global trade in cut flowers and therefore the trade in foliage within the EU
Fresh fruit	7,250,370	80,045	Competition from South Africa, Chile, Spain, Brazil, etc.	Benelux is important in importing and distributing fresh fruit within the EU
Wine / 2204	2,808,234	41,039	competition from France, Germany and New World Wine countries	per capita consumption of wine continues to grow in the Benelux

Source: World Trade Atlas

Section 5. Key Contacts and Further Information

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Website: www.usembassy.nl/fas.html or www.fas.usda.gov

To obtain the appropriate commodity code for your product, you can contact the Dutch customs at +31 45 574 3031 or visit the following website http://ec.europa.eu/taxation_customs/dds/en/tarhome.htm. This website also provides tariff classification and rates.

It is also possible to obtain a written binding ruling called a Binding Tariff Information (BTI). This will provide assurances that you have the correct tariff classification for your product. More information on how to apply for BTI is available online at: http://www.douane.nl/zakelijk/invoer/en/invoer-05.html

More information on EU import duties can be found on http://useu.usmission.gov/agri/import.html.

Marketing

An overview of leading trade shows can be found in Appendix 2.

Reports

Related Reports from FAS/The Hague and other European offices can be found on http://www.fas.usda.gov/scriptsw/attacherep/default.asp. Below you will find a selection of the reports from FAS/The Hague.

Figure 18: FAS/The Hague recent reports

Report Number	Report Title	Date Released
NL5002/BE5001	Benelux Horticulture Report	01/2005
NL6009	Dutch Snack and Confectionary Market	03/2006
NL6017	Consolidation Food Retail Market	06/2006
NL6024	Benelux Organic Market	07/2006
NL7002/BE7001	Benelux Tree Nuts Market	01/2007
NL7008	Benelux Beef Market	04/2007
NL7021	Dutch Specialty Foods	09/2007
NL7028/BE7006	Food Retail	11/2007
NL8009	EU Seafood Marketing Report	04/2008
NL8012	Food Processing Industry	06/2008
NL8017/BE8006	FAIRS	09/2008
NL8022	Export Certification Guide	10/2008
NL8025	Frozen Potato Report	11/2008
NL9002	HRI Foodservice Industry	01/2009
NL9009	Fishery Report	04/2009

For more information on exporting to the Benelux market but also marketing related questions, please contact Marcel Pinckaers at marcel.pinckaers@usda.gov or +31 (0)70-3102 305.

Appendix 1. Leading Wholesalers/Distributors in the Benelux

(in alphabetical order)

Deli XL
Mr. D. Slootweg
P.O. Box 440
Frankeneng 18
6710 BK, Ede, the Netherlands
P: +31-(0)318-678911
F: +31-(0)318-622347
E: dick.slootweg@ahold.nl
W: www.delixl.nl

Hanos
Mr. V. Looijengoed
P.O. Box 10378
Stadhoudersmolenweg 37
7301 GJ, Apeldoorn, the Netherlands
P: +31-(0)55-5294444
F: +31-(0)55-5224621
E: hvanlooijengoed@hanos.nl
W: www.hanos.nl

ISPC
Mr. M. Vugts
Kalshoven 25
4825 AL, Breda, the Netherlands
P: +31-(0)76-5726726
F: +31-(0)76-5726810
E: mvugts@ispc-int.com

JAVA
Wingepark 10
B-3110 Rotselaar, Belgium
P: +32-(0)16 589 620
F: +32-(0)16 589 611
W: www.jave-coffee.be

W: www.ispc-int.com

De Kweker
Mr. P. Poelstra
P.O. Box 59345
Jan van Gaalenstraat 4
1040 KH, Amsterdam, the Netherlands
P: +31-(0)20-6063606
F: +31-(0)20-6063600
E: info@kweker.nl
W: www.kweker.nl

Makro (Metro Cash & Carry)
Mr. J. Cervera
Diermervijver, Gebouw Vijverpoort,
Dalsteindreef 101-139
1112 XC Diemen, the Netherlands
P: +31-(0)20-3980200
F: +31-(0)20-3980201
W: www.makro.nl

Sligro
Mr. R. van Herpen
P.O. Box 47
Corridor 11
5460 AA, Veghel, the Netherlands
P: +31-(0)413-343500
F: +31-(0)413-341520
I: info@sligro.nl
W: www.sligro.nl

Source: FAS/The Hague

Appendix 2. Trade Shows

Food Shows Frequently Visited by Benelux Food Buyers		
Show	When	Show Organizers
Fresh Rotterdam, Rotterdam, The Netherlands Fruit & vegetable trade show	September 21 - 23, 2009 Bi-Annual	tel: +31-(0)10-2933300 fax: +31-(0)10-2933399 www.freshrotterdam.nl
Food Week, Utrecht, The Netherlands National food and beverage trade show	September 28 - 30, 2009	tel: +31-(0)30-2952799 fax: +31-(0)30-2952814 www.foodweek.nl
ANUGA, Cologne, Germany. Europe's largest food & beverages trade show in 2009 **USDA Endorsed Show** Trade Show Office Contact: Sharon Cook tel: +1-202-7203425 Sharon.Cook@usda.gov	October 10 – 14, 2009 Bi-Annual	tel: +49-180-5204220 fax: +49-221-821991010 www.anuga.com
Hortifair, Amsterdam, The Netherlands	October 13 – 16, 2009 Annual	tel: +31 (0)297-344033 fax: +31 (0)297-326850

Worldwide Horticultural Trade Fair		www.hortifair.nl info@hortifair.nl
Horeca Expo, Gent, Belgium Regional Hotel, Restaurant and Catering Show	November 22 – 26, 2009	tel: +32-(0)9-2419211 fax: +32-(0)9-2419475 email: horeca@flandersexpo.be www.horecaexpo.be
HORECAVA, Amsterdam, The Netherlands National Hotel and Restaurant Show	January 11 – 14, 2010	tel: + 31-(0)20-5753032 fax: + 31-(0)20-5753093 www.horecava.nl
European Fine Food Fair, Maastricht, The Netherlands Regional high-end Hotel and Restaurant Show	January 25 – 27, 2010	tel: +31-(0)43-3838383 fax: +31-(0)43-383830 www.efff.nl
European Seafood Exhibition, Brussels, Belgium One of the world's largest seafood trade show **USDA Endorsed Show** Trade Show Office Contact: Sharon Cook tel: +1-202-7203425 Sharon.Cook@usda.gov	April 27 – 29, 2010	tel: +1-207-8425504 fax: +1-207-8425505 www.euroseafood.com
World of Private Label (PLMA) Amsterdam, The Netherlands Europe's largest Private Label trade show	May 18 – 19, 2010	tel: +31-(0)20-5753032 fax: +31-(0)20-5753093 www.plmainternational.com
SIAL, Paris, France Europe's largest food & beverages trade show in 2010 **USDA Endorsed Show** Trade Show Office Contact: Sharon Cook tel: +1-202-7203425 Sharon.Cook@usda.gov	October 19 -23, 2010 Bi-Annual Show	tel: +33-(0)1-49685498 fax: +33-(0)1-49685632 www.sial.fr

Source: FAS/The Hague

Appendix 3. An Overview Of The Leading Benelux Importers Of Specialty Foods Supplying Both Foodservice And Food Retail

(in alphabetical order)

American Food Service
Mr. G. Chin-A-Kwie
Gageldijk 1
3602 AG Maarssen, the Netherlands
P: +31-(0)30-2613604
F: +31-(0)30-2613624
E: gchin@americanfood.nl
W: www.americanfood.nl

Bickery Food Group
Mr. J. Manassen
P.O. Box 433
1200 AK, Hilversum, the Netherlands
P: +31-(0)35-6560244
F: +31-(0)35-6563824
E: joost.manassen@bickery.nl
W: www.bickery.nl

Engel Foreign Food
Mr. W. Engel
Ondernemingsweg 264
1422 DZ, Uithoorn, the Netherlands
P: +31-(0)297-533833
F: +31-(0)297-531665
E: w.engel@xs4all.nl
W: www.engelforeignfood.com

GranFood
Mr. S. Mozzi
P.O. Box 19045
Saturnusstraat 43
2500 CA, The Hague, the Netherlands
P: +31-(0)70-3815007
F: +31-(0)70-3850259
E: stefano.mozzi@granfood.nl
W: www.grandfood.nl

Maer Foods
Mr. H. Rijpma
P.O. Box 79
7590 AB, Denekamp, the Netherlands
P: +31-(0)541-358010
F: +31-(0)541-358011
E: hillebrand.rijpma@maerfoods.eu
W: www.maerfoods.eu

Pietercil Barends
Mr. D. van Bueren
Bleiswijkseweg 51
2280 AB, Zoetemeer, the Netherlands
P: +31-(0)79-3441148
F: +31-(0)79-3424549
E: danny.van.Bueren@pietercil.com
W: www.pietercil.com

Pietercil Delby's
Mr. P. Deschaepmeester
Vitseroelstraat 74
B-1740 Ternat, Belgium
tel.: +32 2583 81 00
fax: +32 2582 29 63
E:philippe.deschaepmeester@pietercil.com
W: www.pietercil.com

Two Food
Mrs. L. van Eijden-Vellekoop
Vosseveldlaan 23
3768 GK, Soest, the Netherlands
P: +31-(0)35-6090990
F: +31-(0)35-6090988
E: info@twofood.nl
W: www.twofood.nl

Wessanen
Mr. R. Miedema
P.O. Box 2554
Beneluxlaan 9
3500 GN, Utrecht, the Netherlands
P: +31-(0)30-2988738
F: +31-(0)30-2988703
E: Richard.Miedema@wessanen.com
W: www.boas.nl

ZENOBIA
Mr. P. Cosse
Rue du Grand Cortil 17
B-1300 Wavre, Belgium
P: +32-(0)10-222394
F: +32-(0)10-222394

Source: FAS/The Hague

Table A. Key Trade & Demographic Information For The Netherlands & Belgium, 2008 Figures

The Netherlands

Agricultural, Fish and Forestry Imports From All Countries (USD Million) / U.S. Market Share (%)	55,871 / 3.8
Consumer Oriented Food Imports From All Countries (USD Million) / U.S. Market Share (%)	27,104 / 2.7
Fish and Seafood Imports From All Countries (USD Million) / U.S. Market Share (%)	2,804 / 3.5
Population (Million) / Annual Growth Rate (%)	16.5 / 0.6
Number of Major Metropolitan Areas	Amsterdam, Rotterdam, The Hague and Utrecht
Per Capita Gross Domestic Product (USD)	51,070
Unemployment Rate (%)	3.9

Source: World Trade Atlas

Belgium

Agricultural, Fish and Forestry Imports From All Countries (USD Million) / U.S. Market Share (%)	42,671 / 1.7
Consumer Oriented Food Imports From All Countries (USD Million) / U.S. Market Share (%)	22,537 / 1.4
Fish and Seafood Imports From All Countries (USD Million) / U.S. Market Share (%)	2,236 / 1.4
Total Population (Millions) / Annual Growth Rate (%)	10.4 / 0.2
Number of Major Metropolitan Areas	Brussels and Antwerp
Per Capita Gross Domestic Product (USD)	46,663
Unemployment Rate (%)	7.0

Source: World Trade Atlas

Exchange Rate

Year	USD	EURO
2001	1	1.12
2002	1	1.06
2003	1	0.88
2004	1	0.81
2005	1	0.80
2006	1	0.80
2007	1	0.73
2008	1	0.68
2009*	1	0.75

* Average exchange rate from Jan – Jun, 2009.

Table B. Consumer Food & Edible Fishery Products Imports

Netherlands Imports	Imports from the World			Imports from the US.			US Market Share		
	2006	**2007**	**2008**	**2006**	**2007**		**2006**	**2007**	**2008**
	USD Million			USD Million			%		
CONSUMER-ORIENTED AGRICULTURAL TOTAL	20,585	25,168	27,104	596	656	725	2.89	2.61	2.68

Snack Foods (Excl. Nuts)	1,100	1,414	1,450	5	10	9	0.47	0.67	0.60
Breakfast Cereals & Pancake Mix	85	101	125	0	0	0	0.35	0.20	0.34
Red Meats, Fresh/Chilled/Frozen	1,880	2,440	2,842	6	16	44	0.34	0.67	1.55
Red Meats, Prepared/Preserved	765	884	1,233	0	1	0	0.06	0.08	0
Poultry Meat	528	732	745	0	0	0	0.00	0.00	0
Dairy Products (Excl. Cheese)	2,230	2,848	2,514	15	27	26	0.67	0.93	1.05
Cheese	611	731	880	0	6	14	0.05	0.86	1.61
Eggs & Products	135	170	223	5	7	7	3.43	4.35	3.04
Fresh Fruit	3,025	3,565	4,079	26	28	45	0.86	0.78	1.10
Fresh Vegetables	1,427	1,707	1,605	5	3	6	0.35	0.19	0.35
Processed Fruit & Vegetables	1,441	1,954	1,964	37	40	68	2.53	2.05	3.49
Fruit & Vegetable Juices	1,129	1,131	1,284	71	63	61	6.30	5.61	4.78
Tree Nuts	557	603	613	171	165	145	30.72	27.40	23.68
Wine & Beer	1,132	1,433	1,482	40	36	35	3.55	2.48	2.36
Nursery Products & Cut Flowers	1,366	1,624	1,854	58	65	64	4.26	3.98	3.44
Pet Foods (Dog & Cat Food)	202	249	259	7	9	6	3.67	3.78	2.49
Other Consumer-Oriented Products	2,973	3,580	3,952	148	179	194	4.98	5.01	4.90
FISH & SEAFOOD PRODUCTS	2,256	2,622	2,804	78	71	99	3.47	2.72	3.53
Salmon	75	85	88	12	14	16	16.04	16.24	18.51
Surimi	45	63	46	2	1	3	5.07	2.06	5.93
Crustaceans	417	470	616	5	1	2	1.18	0.15	0.34
Groundfish & Flatfish	1,053	1,247	1,215	38	32	51	3.65	2.57	4.20
Molluscs	117	109	109	14	16	19	11.58	14.59	17.37
Other Fishery Products	548	648	729	7	8	8	1.26	1.17	1.08
AGRICULTURAL PRODUCTS TOTAL	32,967	42,001	49,402	1,381	1,587	1,949	4.19	3.78	3.95
AGRICULTURAL, FISH & FORESTRY TOTAL	38,281	48,429	55,871	1,494	1,694	2,093	3.90	3.50	3.75

Source: World Trade Atlas

Belgium Imports	Imports from the World			Imports from the US.			US Market Share		
	2006	**2007**	**2008**	**2006**	**2007**		**2006**	**2007**	**2008**
	USD Million			USD Million			%		
CONSUMER-ORIENTED AGRICULTURAL TOTAL	16,496	20,008	22,537	214	271	320	1.29	1.36	1.42
Snack Foods (Excl. Nuts)	967	1,141	1,243	2	2	3	0.17	0.16	0.23
Breakfast Cereals & Pancake Mix	128	141	169	0	0	1	0.21	0.16	0.56

Red Meats, Fresh/Chilled/Frozen	893	980	1,177	9	9	12	1.01	0.86	1.01
Red Meats, Prepared/Preserved	594	720	809	0	0	0	0.01	0.01	0.01
Poultry Meat	301	372	417	0	0	0	0.00	0.00	0
Dairy Products (Excl. Cheese)	1,672	2,257	2,222	3	8	12	0.15	0.35	0.53
Cheese	1,077	1,245	1,473	0	0	0	0.00	0.00	0
Eggs & Products	100	127	158	0	0	0	0.23	0.33	0.13
Fresh Fruit	2,800	3,148	3,765	28	35	35	1.00	1.10	0.93
Fresh Vegetables	892	1,137	1,165	0	0	0	0.01	0.01	0.02
Processed Fruit & Vegetables	1,240	1,524	1,805	16	20	25	1.26	1.30	1.40
Fruit & Vegetable Juices	733	979	1,044	12	15	13	1.61	1.58	1.28
Tree Nuts	261	315	372	63	85	118	23.93	27.09	31.64
Wine & Beer	1,240	1,642	1,850	5	4	7	0.40	0.22	0.40
Nursery Products & Cut Flowers	474	560	618	24	35	35	5.02	6.32	5.59
Pet Foods (Dog & Cat Food)	385	447	534	24	20	16	6.24	4.57	3.05
Other Consumer-Oriented Products	2,739	3,292	3,717	29	38	42	1.06	1.14	1.13
FISH & SEAFOOD PRODUCTS	1,886	2,093	2,236	40	33	30	2.13	1.57	1.32
Salmon	118	120	129	7	4	4	5.67	3.42	3.38
Surimi	9	10	11	0	0	0	0.59	0.00	0
Crustaceans	702	809	859	2	3	4	0.34	0.32	0.45
Groundfish & Flatfish	547	573	615	5	5	3	0.86	0.93	0.55
Molluscs	211	224	230	20	15	13	9.67	6.91	5.81
Other Fishery Products	300	356	392	6	5	5	2.01	1.50	1.17
AGRICULTURAL PRODUCTS TOTAL	25,149	30,945	37,118	482	626	634	1.91	2.02	1.71
AGRICULTURAL, FISH & FORESTRY TOTAL	29,721	36,483	42,671	560	699	706	1.88	1.92	1.65

Source: World Trade Atlas

Table C. Top 15 Suppliers Of Consumer Foods And Edible Fishery Products

CONSUMER-ORIENTED AGRICULTURAL TOTAL

Report: Netherlands Imports - Top 15 Ranking

USD 1,000	2006	2007	2008
Germany	4,352,899	5,411,300	5,577,861
Belgium	3,040,564	3,619,036	3,813,742

FISH & SEAFOOD PRODUCTS

Report: Netherlands Imports - Top 15 Ranking

USD 1,000	2006	2007	2008
Iceland	394,939	435,645	406,764
Germany	277,522	327,687	309,521

France	1,475,816	1,975,657	2,010,130
Brazil	1,331,409	1,640,251	1,668,153
Spain	1,202,776	1,402,330	1,374,072
South Africa	605,016	794,552	909,393
UK	623,721	790,573	904,262
Italy	506,659	650,352	748,639
Chile	464,252	556,803	744,106
U.S.A.	595,885	655,566	725,032
Other	8,386,267	7,671,240	8,628,563
World	20,585,264	25,167,660	27,103,953

Belgium	149,860	191,530	177,957
China	131,269	152,384	175,872
Denmark	135,840	155,836	148,358
Vietnam	103,890	135,447	142,695
Norway	53,772	115,300	137,508
Morocco	51,272	75,188	129,333
Ecuador	40,126	70,191	122,636
UK	134,046	143,474	119,956
U.S.A.	78,183	71,199	98,943
Other	705,624	702,670	833,985
World	2,256,343	2,621,551	2,803,528

Source: World Trade Atlas

CONSUMER-ORIENTED AGRICULTURAL TOTAL
Report: Belgium Imports - Top 15 Ranking

USD 1,000	2006	2007	2008
France	4,133,697	5,021,317	5,694,429
Netherlands	3,629,290	4,486,297	4,013,684
Germany	2,083,771	2,566,755	2,781,765
Spain	696,691	832,044	949,309
Italy	656,548	757,698	884,962
Brazil	496,246	692,887	711,226
Colombia	452,956	364,137	709,401
Costa Rica	350,922	562,729	658,085
New Zealand	438,642	421,555	534,020
UK	458,127	537,488	532,643
Ecuador	267,429	373,280	380,695
U.S.A.	213,533	271,341	319,684
Other	2,618,003	3,120,949	4,367,522
World	16,495,855	20,008,477	22,537,425

Source: World Trade Atlas

FISH & SEAFOOD PRODUCTS
Report: Belgium Imports - Top 15 Ranking

USD 1,000	2006	2007	2008
Netherlands	434,145	498,375	548,420
France	190,683	200,729	221,419
Bangladesh	96,609	119,964	134,973
Germany	102,882	119,058	134,186
China	62,626	89,902	106,546
Denmark	106,937	101,602	102,928
India	96,420	109,203	98,377
Vietnam	83,119	82,950	96,076
U.K.	79,144	80,225	83,230
Iceland	87,673	96,008	74,142
Indonesia	65,350	65,645	60,957
U.S.A.	40,254	32,819	29,617
Other	440,417	496,269	545,113
World	1,886,259	2,092,749	2,235,984

[1] Highest export levels since at least CY 1970

[2] Estimates by FAS/The Hague based on figures of the FNLI and Centrale Raad voor het Bedrijfsleven